

WebFOCUS

ReportCaster End User's Manual
Version 5 Release 2

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Preface

This documentation describes how a Managed Reporting Analytical User (formerly specified as a Java User) or a Business Intelligence Dashboard user can create and distribute a schedule for their own Managed Reporting My Report. It is intended for users who want to schedule their own reports and distribute those reports to specified recipients. This documentation is part of the WebFOCUS documentation set.

How This Manual Is Organized

This manual includes the following chapters:

Chapter/Appendix		Contents
1	Introducing ReportCaster	Describes how to access and use the ReportCaster Scheduling Wizard, and the ReportCaster UAS Interface.
2	Creating and Maintaining a Distribution List	Discusses how to create, edit, and delete a Distribution List. It also describes ReportCaster's burst feature.
3	Creating a Schedule	Describes how to schedule a My Report using the Scheduling Wizard.
4	Maintaining a Schedule	Discusses how to edit the properties of a schedule, delete a schedule, or run a log report to obtain information about a schedule.
5	Report Library	Describes the Report Library, an optional storage and retrieval facility for ReportCaster output. Provides information about creating and maintaining Library Access Lists, and viewing Library Content.
A	ReportCaster Formats	Provides descriptions, suggested uses, and considerations about each ReportCaster output format.

Documentation Conventions

The following conventions apply throughout this manual:

Convention	Description
THIS TYPEFACE or <i>this typeface</i>	Denotes syntax that you must enter exactly as shown.
<i>this typeface</i>	Represents a placeholder (or variable) in syntax for a value that you or the system must supply.
<u>underscore</u>	Indicates a default setting.
<i>this typeface</i>	Represents a placeholder (or variable) in a text paragraph, a cross-reference, or an important term.
this typeface	Highlights a file name or command in a text paragraph that must be lowercase.
<i>this typeface</i>	Indicates a button, menu item, or dialog box option you can click or select.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices; type one of them, not the braces.
[]	Indicates a group of optional parameters. None are required, but you may select one of them. Type only the parameter in the brackets, not the brackets.
	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis points (...).
. . . .	Indicates that there are (or could be) intervening or additional commands.

In this manual, the term Internet refers to corporate intranets as well as the Internet.

Related Publications

Visit our World Wide Web site, <http://www.informationbuilders.com>, to view a current listing of our publications and to place an order. You can also contact the Publications Order Department at (800) 969-4636.

Customer Support

Do you have questions about ReportCaster?

Call Information Builders Customer Support Service (CSS) at (800) 736-6130 or (212) 736-6130. Customer Support Consultants are available Monday through Friday between 8:00 a.m. and 8:00 p.m. EST to address all your WebFOCUS ReportCaster questions. Information Builders consultants can also give you general guidance regarding product capabilities and documentation. Please be ready to provide your six-digit site code number (xxxx.xx) when you call.

You can also access support services electronically, 24 hours a day, with InfoResponse Online. InfoResponse Online is accessible through our World Wide Web site, <http://www.informationbuilders.com>. It connects you to the tracking system and known-problem database at the Information Builders support center. Registered users can open, update, and view the status of cases in the tracking system and read descriptions of reported software issues. New users can register immediately for this service. The technical support section of www.informationbuilders.com also provides usage techniques, diagnostic tips, and answers to frequently asked questions.

To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

Information You Should Have

To help our consultants answer your questions most effectively, be ready to provide the following information when you call:

- Your six-digit site code number (xxxx.xx).
- Your WebFOCUS configuration:
 - The front-end you are using, including vendor and release.
 - The communications protocol (for example, TCP/IP or HLLAPI), including vendor and release.
 - The software release.
 - The server you are accessing, including release (for example, 4.2.1).

- The stored procedure (preferably with line numbers) or FOCUS commands being used in server access.
- The name of the Master File and Access File.
- The exact nature of the problem:
 - Are the results or the format incorrect? Are the text or calculations missing or misplaced?
 - The error message and return code, if applicable.
 - Is this related to any other problem?
- Has the procedure or query ever worked in its present form? Has it been changed recently? How often does the problem occur?
- What release of the operating system are you using? Has it, WebFOCUS, your security system, communications protocol, or front-end software changed?
- Is this problem reproducible? If so, how?
- Have you tried to reproduce your problem in the simplest form possible? For example, if you are having problems joining two data sources, have you tried executing a query containing the code to access a single data source?
- Do you have a trace file?
- How is the problem affecting your business? Is it halting development or production? Do you just have questions about functionality or documentation?

User Feedback

In an effort to produce effective documentation, the Documentation Services staff welcomes any opinion you can offer regarding this manual. Please use the Reader Comments form at the end of this manual to relay suggestions for improving the publication or to alert us to corrections. You can also use the Documentation Feedback form on our Web site, <http://www.informationbuilders.com>.

Thank you, in advance, for your comments.

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CHAPTER 1

Introducing ReportCaster

Topic:

- Accessing and Using the Scheduling Wizard
- Accessing and Using the ReportCaster UAS Interface

Managed Reporting Analytical Users (formerly specified as a Java User) can schedule and distribute their own My Reports using the Scheduling Wizard, which may be accessed from the Business Intelligence Dashboard and Managed Reporting Domains environments. My Reports can be distributed using e-mail, to a printer, as a report in a Managed Reporting My Reports folder, or to the optional Report Library.

When scheduling a My Report, you must select whether to distribute it to a Distribution List, distribution file name, or to a single location. You can distribute an entire report, or you can break a report into sections using ReportCaster's burst feature. When you burst a report, you send only the relevant report sections to the users you specify.

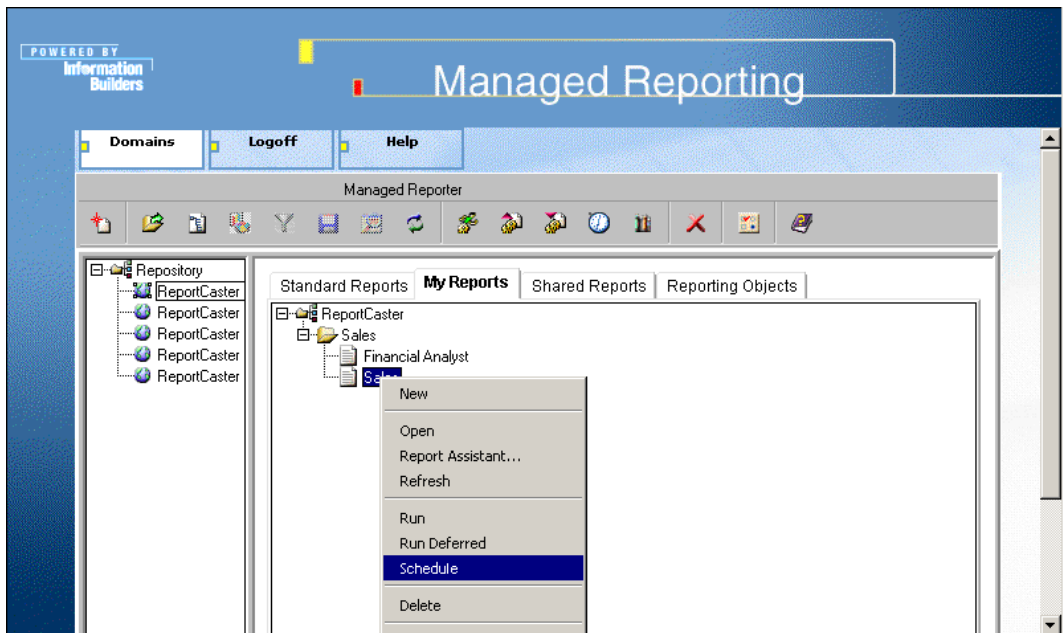
ReportCaster enables you to determine the recipients of each scheduled report, the format for the report output, and when the report will be sent. ReportCaster gives you the ability to schedule and distribute reports at any time.

The ReportCaster User Administration Services (UAS) Interface enables Managed Reporting Analytical Users to create and maintain Distribution Lists and Access Lists, edit and delete schedules, run log reports to obtain information about schedules, and purge the log file to conserve space.

Accessing and Using the Scheduling Wizard


As a Managed Reporting Analytical User with schedule capability, you can schedule your own My Reports using the ReportCaster Scheduling Wizard, which may be accessed from the Business Intelligence Dashboard and Managed Reporting Domains environments. If you do not have the schedule capability, contact your Managed Reporting Administrator to request this capability.

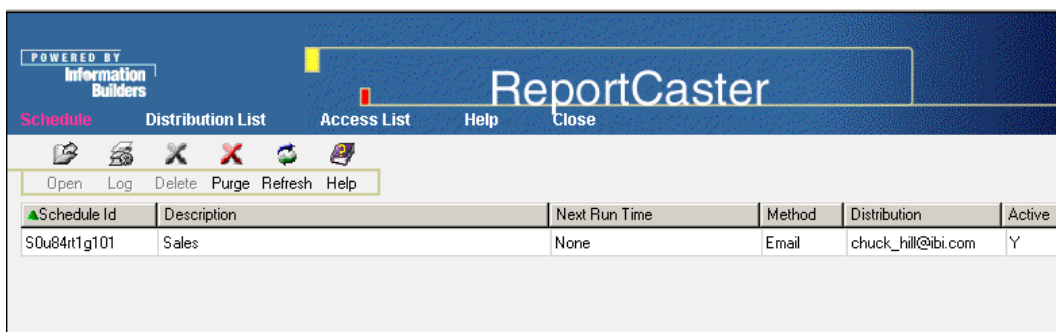
To create a new schedule, right-click a My Report and select *Schedule* from the drop-down menu.



This opens the Scheduling Wizard, which guides you through the necessary steps for creating a schedule. For more information about the Scheduling Wizard, see Chapter 3, *Creating a Schedule*.

Accessing and Using the ReportCaster UAS Interface

As a Managed Reporting Analytical User, you must create a schedule using the Scheduling Wizard. However, all additional ReportCaster functionality is accomplished using the ReportCaster UAS Interface. You can access the ReportCaster UAS Interface from the Business Intelligence Dashboard and Managed Reporting Domains environments by clicking the *Clock* icon  on the gray toolbar. The ReportCaster UAS Interface opens displaying all schedules that you have created using the Scheduling Wizard:



From this interface, you may perform the following functions:

- Create and maintain a Distribution List that can then be assigned to scheduled reports. For more information, see Chapter 2, *Creating and Maintaining a Distribution List*.
- Create and maintain a Library Access List that is then assigned to scheduled reports that are distributed to the optional Report Library product. For more information about Access Lists, see Chapter 5, *Report Library*.
- Edit or delete schedules that you have created using the Scheduling Wizard. You can run a log report to obtain information about a schedule, and purge the log file to conserve space. For more information, see Chapter 4, *Maintaining a Schedule*.
- Open the online Help file.
- Close the ReportCaster UAS Interface.

CHAPTER 2

Creating and Maintaining a Distribution List

Topics:

- Accessing the Distribution List Interface
- Creating a Distribution List
- Editing a Distribution List
- Deleting a Distribution List
- Bursting a Report

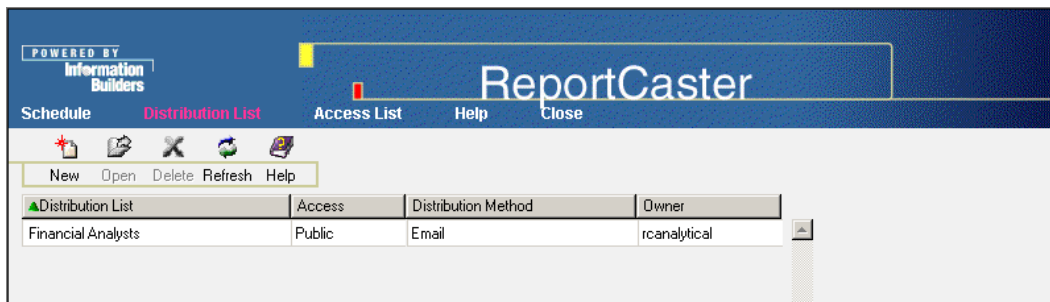
When creating a schedule, you can distribute report output to a single recipient, or to several recipients. If you are creating a schedule to be distributed to several recipients, you may want to create a Distribution List consisting of multiple recipients. The Distribution List may then be assigned to any schedule.

If the entire report is not relevant to those receiving it, you can specify sections of the report to be sent using the burst option. Each person on your Distribution List can receive different sections of the report depending on the individual burst values you specify.

If you are using the optional Report Library product, you must create an Access List instead of a Distribution List. For more information, see Chapter 5, *Report Library*.

Accessing the Distribution List Interface

From the ReportCaster UAS Interface, click the *Distribution List* link. All Distribution Lists that you have access to (public lists and your own private lists) appear:




From the Distribution List window, you can:

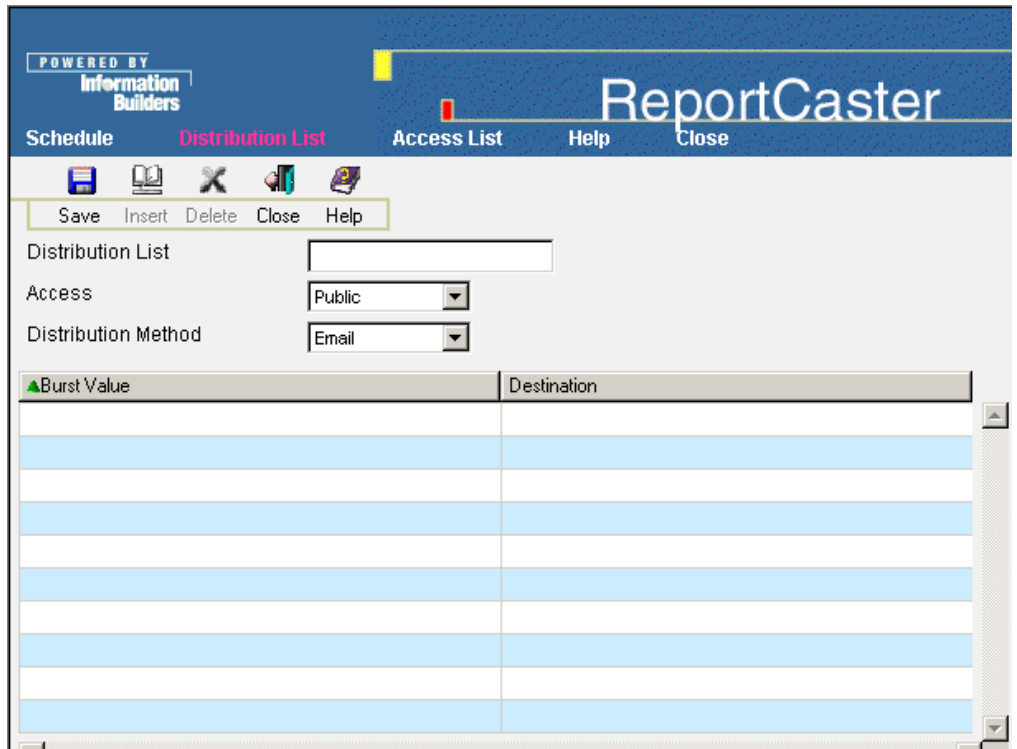
- Create a new Distribution List. For more information, see *Creating a Distribution List* on page 2-2.
- Edit the properties of a Distribution List. For more information, see *Editing a Distribution List* on page 2-6.
- Delete a Distribution List. For more information, see *Deleting a Distribution List* on page 2-7.
- Refresh the window so that it contains the latest Distribution List information.
- Open the online Help file.

Creating a Distribution List

When you create a Distribution List, you specify the name of the Distribution List, the distribution method (e-mail or printer), the destinations to which the report will be distributed, public or private access, and optional burst values.

Procedure How to Create a Distribution List

1. From the Distribution List window, click the New icon . The following window appears:



Burst Value	Destination

- **Distribution List.** Specify a name for your Distribution List (for example, Sales Team).
- **Access.** Select Public (default) or Private from the drop-down list. Only the owner and ReportCaster Administrators can view a Private Distribution List, whereas every ReportCaster user can view a Public Distribution List.
- **Distribution Method.** Select Email (default) or Printer from the drop-down list.

- **Burst Value.** If you are bursting a report, specify individual sort values in the Burst Value field. The burst value may be a maximum of 75 characters.

The burst value for a tabular report will be the first BY field, which is the primary sort field. The burst value for a graph report will be the second BY field. The burst value specified must exist in the data source that the scheduled job reports against.

For more information about bursting a report, see *Bursting a Report* on page 2-8.

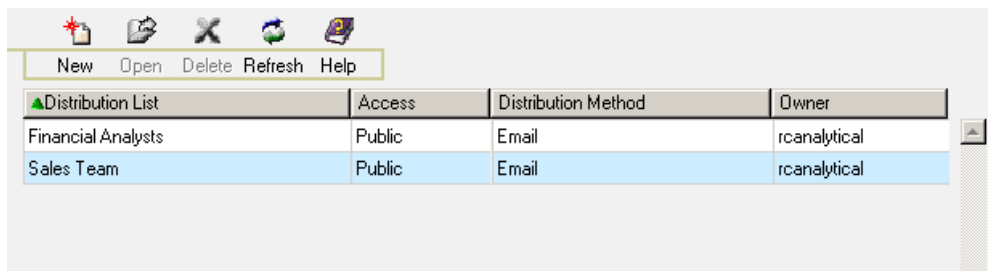
2. Destination. Specify the destinations to which the report will be distributed.

- If you selected Email in step 5, enter the e-mail addresses of the recipients. Be careful entering this information because there is no edit checking except for the @ sign.
- If you selected Printer in step 5, specify the printer server locations and names to which you want to distribute the report. Each printer location and name you specify must be accessible by the Distribution Server.

Note:

- If you specified burst values in step 6, be sure to match the specified e-mail or printer destinations with the appropriate burst values.
- The maximum number of e-mail addresses or printers you can specify in a Distribution List is 9999.
- If you are specifying more than ten e-mail addresses or printers in your Distribution List, click the *Insert* icon to insert additional rows.
- For more information about creating an e-mail Distribution List, see *Considerations When Creating an E-mail Distribution List* on page 2-5.
- For more information about creating a printer Distribution List, see *Considerations When Creating a Printer Distribution List* on page 2-5.

3. Click *Save* to save the Distribution List.



Distribution List	Access	Distribution Method	Owner
Financial Analysts	Public	Email	rcanalytical
Sales Team	Public	Email	rcanalytical

Considerations When Creating an E-mail Distribution List

You can use group mail lists (defined on your mail server) with e-mail Distribution Lists. Group mail lists enable you to send output or notification to multiple recipients without having to maintain multiple e-mail addresses in the ReportCaster Repository.

Considerations When Creating a Printer Distribution List

When creating a Distribution List, be aware of the following platform-specific considerations:

Windows:

- The target printer must be defined as a network printer available on the Windows system on which the Distribution Server is installed.
- If your site uses a Novell NetWare network, the Windows server that contains the Distribution Server must have Novell Client 32 installed.
- Information Builders recommends using the PS or DOC format instead of the WP format when printing from a Windows machine.

UNIX:

Contact your UNIX Administrator for a list of defined printers. An administrator can generate a list of defined printers by using the following UNIX command:

```
lpstat -t
```

z/OS:

The printer should be a SYSOUT class (such as A) that has been routed to a printer. For example, you can indicate that scheduled report output be distributed to a specific network printer by entering the following printer identification

```
A DEST IBIVM.P24E2
```

where:

A

Is the SYSOUT class to be assigned to a network printer.

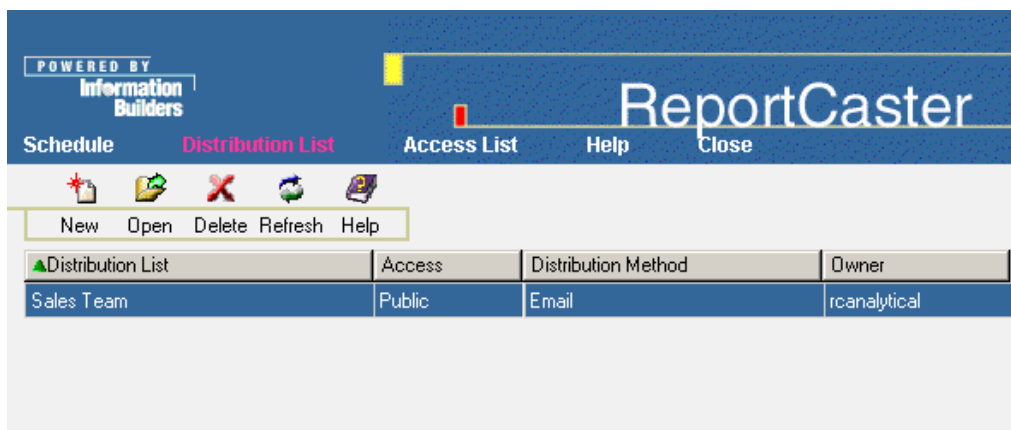
```
IBIVM.P24E2
```

Is the printer location and name.

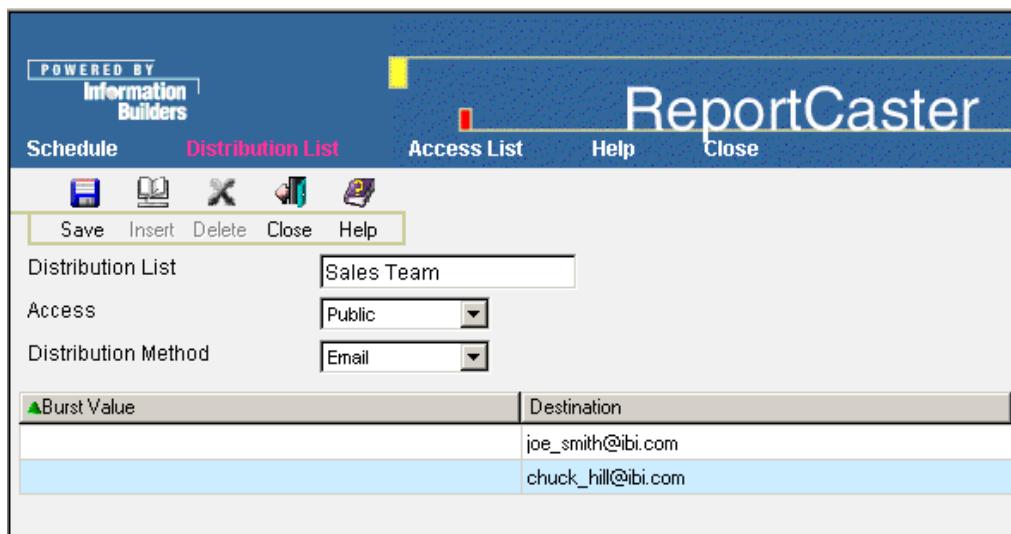
Editing a Distribution List

From the Distribution List window in the ReportCaster UAS Interface, you can edit your own previously created Distribution Lists at any time by performing the following steps:

1. Select the Distribution List you want to edit (for example, Sales Team):



2. Click the Open icon . The properties of the selected Distribution List appears:

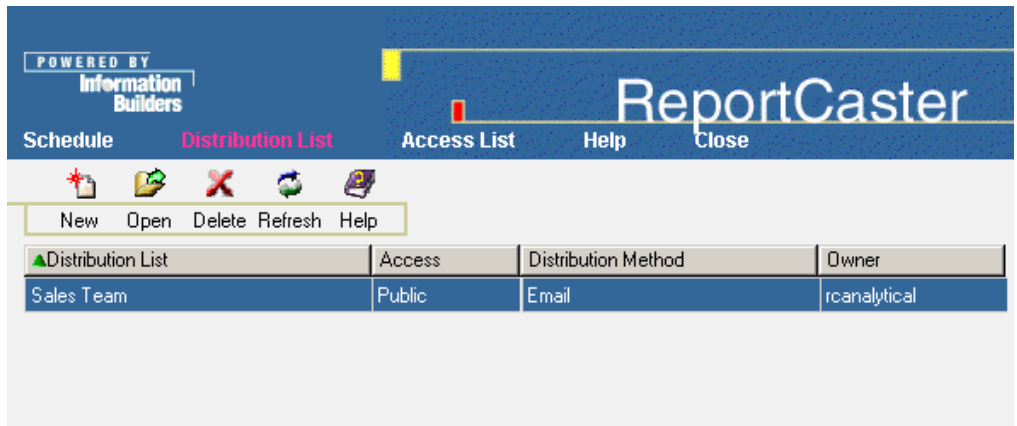



3. You can perform the following functions:
 - Rename the Distribution List. The original Distribution List will remain unaltered.
 - Change the values of already existing entries. For example, you can make the Distribution List Private instead of Public, or you can change the destinations.
 - Insert additional Burst values and Destinations by clicking the *Insert* icon. A new row appears where your cursor is positioned, enabling you to insert additional entries.
 - Delete Burst Values and Destinations by selecting the row and clicking the *Delete* icon.
4. Once you have completed making the necessary changes to your Distribution List, click the *Save* icon to save the changes.

Deleting a Distribution List

From the Distribution List window in the ReportCaster UAS Interface, you can delete your own Distribution Lists at any time by performing the following steps:

1. Select the Distribution List you want to delete (for example, Sales Team):



2. Click the *Delete* icon . A message appears asking for confirmation that you want to delete the list. Click *OK* to confirm that you want to delete the Distribution List.

Bursting a Report

Instead of distributing an entire report, you can use ReportCaster's burst feature to break a report into sections to be distributed separately. Bursting enables you to target relevant sections of a report to individual users. Each report section is saved as a separate file.

If you are distributing a bursted tabular report, the burst value is determined by the first BY field. If you are distributing a bursted graph report, the burst value is determined by the second BY field. The burst value is automatically determined by the internal matrix, which is a memory area that stores each database field value and calculates values referenced by the TABLE or GRAPH request.

You can send several report sections to one recipient by specifying that recipient's destination (e-mail address or printer) for each section you want to send. You can send several report sections to one destination, or you can send one report section to several destinations. The burst values you specify in the Distribution List must exist in the data source you are reporting against.

Note: If you want to burst a report, you must select the *Enable Report Bursting* check box when you create the schedule. The burst values specified in the Burst Value column in the Distribution List window are ignored unless the schedule specifies to burst the report. For more information, see Chapter 3, *Creating a Schedule*.

Example Bursting a Sales Report

Suppose that you want to distribute a weekly sales report to sales representatives in several offices across the country. You want to send your report as e-mail attachments. The report you are distributing contains information about sales branches throughout the entire country. However, individual sales representatives are affected only by the sales in their region. Assuming that you will specify to burst the report when you create the schedule, create a Distribution List to send only the relevant regional sales information to each representative.

The following sample screen shows how you specify burst values when creating a Distribution List. Using the report's primary sort field values for the sales report (Northeast, Southeast, and Southwest), each representative's e-mail address is associated with the corresponding report data, which is the only part of the sales report that is relevant for that user. For example, since Adam Abernathy needs only the data that corresponds to the Northeast branch, the sort value that corresponds to that data in the report (Northeast) is listed in the Burst Value column on the line opposite his e-mail address.

Chuck Hill is a sales representative who works in both the Northeast and Southeast regions. Since he requires data regarding both the Northeast and Southeast regions, his e-mail address is listed twice, and the burst value for each region is specified on separate lines opposite his address. This is how you can send multiple sections of a burst report to a single recipient.

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ReportCaster

Schedule Distribution List Access List Help Close

Save Insert Delete Cancel Help

Distribution List Sales Team

Access Public

Distribution Method Email

Burst Value	Destination
Northeast	chuck_hill@ibi.com
Northeast	adam_abernathy@ibi.com
Southeast	chuck_hill@ibi.com
Southwest	cathy_flosler@ibi.com

CHAPTER 3

Creating a Schedule

Topics:

- Schedule Options
- Report Information
- Distribution Options
- Priority and Notification Options

As a Managed Reporting Analytical User, you can schedule your own My Reports using the ReportCaster Scheduling Wizard, which may be accessed from the Business Intelligence Dashboard and Managed Reporting Domains environments. To create a schedule from Managed Reporting, right-click a My Report and select *Schedule* from the drop-down menu. To create a schedule from the Business Intelligence Dashboard, click a My Report and select *Schedule* from the drop-down menu. This opens the Scheduling Wizard, which includes the following windows:

Schedule. Specify when and how often to run the schedule. For more information, see *Schedule Options* on page 3-2.

Report Information. Select the report format, whether or not to burst the report, and the Execution ID and password. For more information, see *Report Information* on page 3-5.

Distribution. Select whether to distribute the report as an e-mail message, to a printer, as a report in a Managed Reporting folder, or to the Report Library. You must also select whether to distribute the report using a Distribution List, distribution file name, or a single location. For more information, see *Distribution Options* on page 3-7.

Settings. Specify the priority level of the schedule, and notification options. For more information, see *Priority and Notification Options* on page 3-20.

Schedule Options

When you access the ReportCaster Scheduling Wizard, the Schedule window is the first to display:

Schedule

Description

Interval

Schedule Job:
hour(s) Every 1 hour(s) on:

☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

Date/Time

Start Date: Dec 20 2002
Start Time: 02 34 PM
End Date: Dec 31 2021
End Time: 12 59 AM

Options

☒ Enabled (Scheduled jobs run at specified time)
☐ Delete job if it is not scheduled to run again

Back Next Save Run Cancel Help

Enter the following schedule information:

1. **Description.** Enter a descriptive name for the schedule. This name will identify the schedule. After the schedule has run, the description appears in your list of schedules.
2. **Schedule Job.** From the drop-down list, select how frequently you want the schedule to run. Possible values are:
 - **once.** If you want to run the schedule only once. By default, the schedule will execute immediately. Only modify the Start Date or Start Time if you do not want the schedule to run immediately.
 - **hours.** If you want to run the schedule every n hours. Select a range between 1 and 24 hours, and check the days of the week on which you want to run the schedule. For example, the following schedule will run every 3 hours on Monday and Friday:

Schedule Job:

hour(s) Every 3 hour(s) on:

☒ Mon ☐ Tue ☐ Wed ☐ Thu ☒ Fri ☐ Sat ☐ Sun

- **days.** If you want to run the schedule every n days. The following schedule will run every 5 days:

Schedule Job:

day(s) Every 5 day(s)

- **weeks.** If you want to run the schedule every n weeks. Select how often you want to run the schedule (for example, every 2 weeks), and check the days of the week on which you want to run the schedule. The following schedule will run every two weeks on both Monday and Friday:

Schedule Job:

week(s) Every 2 week(s) on:

☒ Mon ☐ Tue ☐ Wed ☐ Thu ☒ Fri ☐ Sat ☐ Sun

- **months.** If you want to run the schedule every n months. Select how often you want to run the schedule (for example, every 3 months), and click the days of the month on which you want to run the schedule. The following schedule will run every three months on the 9th and the 23rd:

Schedule Job:

month(s) Every 3 month(s)

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	Last Day of Month			

Date/Time

You can also click the *Last Day of the Month* option at the end of the calendar to run the schedule on the last day of the month.

- **years.** If you want to run the schedule every n years. In the following schedule, the schedule will run every 2 years:

Schedule Job:

year(s) Every 2 year(s)

3. **Start Date.** Using the drop-down lists, specify the date on which you want the schedule to begin. The default Start Date is the current date.
4. **Start Time.** Using the drop-down lists, specify the time you want the schedule to begin. The default Start Time is the current time. The start time applies only to the Start Date and does not apply to any date thereafter. If you select a time that is after the current time, the scheduled job will not run until the next instance of the Start Time that fits within the schedule's specifications.
5. **End Date.** Using the drop-down lists, specify the date on which you want the schedule to end. The default End Date is December 31, 2021.
6. **End Time.** Using the drop-down lists, specify the time you want the schedule to end. The default End Time is 12:59 A.M.
7. **Enabled (Scheduled jobs run at specified time).** Uncheck the *Enabled* check box if you want the schedule to be inactive.

8. **Delete job if it is not scheduled to run again.** Check this option if you want the schedule to run once and not be stored in the ReportCaster Repository.
9. Click *Next* on the bottom of the window to continue creating the schedule on the Report Information window.

Report Information

Once you have specified scheduling options, you must specify the Report Information:

The screenshot shows a web browser window titled "Create New Schedule - Microsoft Internet Explorer". The main content area has a blue background with the title "Report Information". Below the title, there is a "Report Format:" label followed by a drop-down menu currently set to "HTML". Below that is a checkbox labeled "Enable Report Bursting" which is unchecked. A section titled "Security Information" is separated by a horizontal line. It contains a table with three columns: "Server Name", "Execution Id", and "Password". The "Server Name" column has the value "EDASERVE" entered. The "Execution Id" and "Password" columns have empty text boxes. At the bottom of the window, there is a row of buttons: "Back", "Next", "Save", "Run", "Cancel", and "Help".

1. **Report Format.** Select the report format from the drop-down list. HTML is the default.

There are limitations on what formats are valid for certain options. Not all formats are supported for bursting or for printing. If your report contains a format statement (for example, `FORMAT PDF`), be sure to select the same report format in ReportCaster. The report format specified in this field overrides the format statement in the procedure.

For detailed information about each format, see Appendix A, *ReportCaster Formats*.

2. **Enable Report Bursting.** If you want to burst the report, select the *Enable Report Bursting* check box. The burst feature enables you to break a report into sections and distribute the sections separately. Burst values may be specified in a Distribution List or distribution file. For more information about bursting, see *Bursting Guidelines and Limitations* on page 3-6, and *Bursting a Report* in Chapter 2, *Creating and Maintaining a Distribution List*.
3. **Execution ID.** Enter an Execution ID that is authorized to execute procedures on the Server Name specified.

If this field is grayed out, it means that a default Execution ID and password have been specified within the ReportCaster Server configuration file.
4. **Password.** Enter the valid operating system password for the Execution ID.
5. Click *Next* on the bottom of the window to continue creating the schedule on the Distribution window. For more information, see *Distribution Options* on page 3-7.

Bursting Guidelines and Limitations

Bursting enables you to target relevant sections of a report to individual users. Each section is saved as a separate file. If you are distributing a bursted tabular report, the burst value is determined by the first BY field. If you are distributing a bursted graph report, the burst value is determined by the second BY field. The burst value is automatically determined by the internal matrix. The internal matrix is a memory area that stores each database field value and calculates values referenced by the TABLE or GRAPH request.

The following are guidelines and limitations that apply to ReportCaster's burst feature:

- **Formats.** DOC, EXL2K, EXCL97, EXL2K FORMULA, GIF, HTML, and PDF support bursting. Each bursted section of the report will be named *burstvalue.format* (for example, Northeast.pdf).
- **ACROSS command** - This command is not evaluated as a primary sort field. To burst a report, you must also include a BY field. Bursting will occur on the BY field.
- **FML reports.** Bursting an FML report is not supported since there is no BY field.
- **Compound Reports.** Cannot be burst.
- **TABLEF.** No internal sort processing is performed. The specification of a BY field requires that the data already be sorted in the data source.
- **ON TABLE SUBHEAD/ON TABLE SUBFOOT.** Creates a SUBHEAD for only the first page of the report, and a SUBFOOT for only the last page of the report. When bursting a report, the SUBHEAD and SUBFOOT should occur for each sort break. Therefore, specify the primary sort field in place of TABLE in the ON command. For example:

ON primarysortfield SUBHEAD

Distribution Options

The Distribution window enables you to select how you want to distribute scheduled report output. You can distribute the report using one of the following methods:

- **Email.** For more information, see *Distributing a Report Using E-mail* on page 3-7.
- **Printer.** For more information, see *Distributing a Report to a Printer* on page 3-13.
- **Managed Reporting.** For more information, see *Distributing a Report to Managed Reporting* on page 3-14.
- **Library.** For more information, see *Distributing a Report to the Report Library* on page 3-16.

Distributing a Report Using E-mail

You can distribute a report as an e-mail attachment or inline within the body of an e-mail message. Distributing a report as an inline e-mail message is particularly useful when the report is distributed to mobile devices, fax machines, or through e-mail systems that do not support attachments. For more information about distributing a report to a fax machine, see *Distributing a Report to a Fax Machine Using E-mail* on page 3-10.

Procedure **How to Distribute a Report Using E-mail**

1. On the Distribution window, select *Email* from the Distribute Reports by drop-down list. The following options appear:

The screenshot shows a web browser window titled "Create New Schedule - Microsoft Internet Explorer". The main content area is titled "Distribution".

Under the "Distribution" heading, there is a label "Distribute Reports by" followed by a drop-down menu currently set to "Email".

Below this is a section titled "Mail Information". It contains a drop-down menu set to "Single Address" followed by an empty text input field. Below that are three more text input fields labeled "From:", "Reply Address:", and "Subject:".

Below the "Mail Information" section is a section titled "General Information". It contains a label "Save As Report Name:" followed by an empty text input field. Below that are two radio buttons: "Select report as inline message" (which is unselected) and "Send report as attachment" (which is selected).

Below the "General Information" section is a section titled "Enter message for body of email:". It contains a text area with the text "Please see attachment" and a vertical scrollbar on the right.

At the bottom of the form are six buttons: "Back", "Next", "Save", "Run", "Cancel", and "Help".

2. **Mail Information.** Select *Single Address*, *Distribution File*, or *Distribution List* from the drop-down list.

Tip: You can use group mail lists (defined on your mail server) with any of these options. Group mail lists enable you to distribute a report or notification to multiple recipients without having to maintain multiple e-mail addresses in the ReportCaster Repository.

- **Single Address.** In the accompanying text box, enter the e-mail address of the single recipient. ReportCaster cannot validate the e-mail address entered. An incorrect or unresolved address may not be noted in the log file. This is dependent upon the SMTP mail server's ability to validate the e-mail address. The SMTP mail server will return undeliverable e-mail messages to the reply address you specify for the schedule. The burst option is not supported with this distribution option.

Tip: Depending on your mail server, you may be able to enter more than one e-mail address in this field. Each address must be delimited by what your mail server requires. For example, yahoo e-mail addresses are delimited by a comma, while Outlook e-mail addresses are delimited by a semicolon.

- **Distribution File.** In the accompanying text box, type the full path and file name of the Distribution File. The path and file name must be accessible to the Distribution Server.

The external file must contain comma-delimited records, where the maximum length is 75 bytes. Records must end with a comma followed by a dollar sign (\$). Each record must be entered on a separate line in the file.

To specify a record for a burst procedure, use the following format:

e-mail address, burst value,\$

To specify a record for a non-bursted procedure, use the following format:

e-mail address, ,\$

- **Distribution List.** Select a Distribution List from the Select Address drop-down list, which displays all e-mail Distribution Lists that you are the owner of, and all Public e-mail Distribution Lists. For more information about creating a Distribution List, see Chapter 2, *Creating and Maintaining a Distribution List*.
3. **From.** This can be any value (for example, the name of the person creating the schedule). This is not required by ReportCaster, but may be required by your e-mail system.
 4. **Reply Address.** Enter a valid e-mail address. If recipients reply to the e-mail, their messages will be sent to this address. If your e-mail system is unable to deliver the content, the undeliverable output message is also returned to this address.

5. **Subject.** Enter the text you want to appear in the message's subject line. This information is not required by ReportCaster, but may be needed by your e-mail system.
6. **Save As Report Name.** Enter the name of the report to be distributed.
7. Specify whether you want to distribute the report as an e-mail attachment, or inline within the body of an e-mail message:
 - If you want to distribute the report inline within the body of an e-mail message, select the *Select report as inline message* radio button.
 - If you want to distribute the report as an e-mail attachment, select the *Send report as attachment* radio button. If you want to send an optional message within the body of your e-mail, type the message in the Enter message for body of email box. You may specify a maximum of 256 characters of text.
8. Click *Next* on the bottom of the window to continue to the Settings window. For more information, see *Priority and Notification Options* on page 3-20.

Note: For considerations you should be aware of when creating a schedule using the e-mail distribution method, see *Considerations When Distributing a Report Using Email* on page 3-12.

Example **Distributing a Report to a Fax Machine Using E-mail**

To distribute an inline e-mail message to a fax machine, you must register your e-mail address with a third-party e-mail distribution provider. The features offered by providers, (such as supported area codes and file formats), in addition to requirements on the structure of e-mail parameter values, may vary. It is important that you select a provider whose features are compatible with ReportCaster.

The following example shows how to distribute a report directly to a fax machine. The e-mail address, john_doe@ibi.com, was registered with the e-mail distribution provider called *emfax.com*. During the processing of the request, ReportCaster generates the scheduled report output and then distributes it using the e-mail address of *emfax.com*. The reply address specified in ReportCaster is the registered e-mail address that will be validated by *emfax.com*. If the e-mail address is valid, *emfax.com* will distribute the report to the fax number 12129999999. The validation of the registered e-mail address is performed by *emfax.com*, not by ReportCaster.

Note: The syntax used in this illustration is specific to this example. The required syntax for your provider may be different.

1. On the Distribution window, select *Email* from the Distribute Reports by drop-down list. The following options appear:

The screenshot shows a web browser window titled "Create New Schedule - Microsoft Internet Explorer". The main content area is titled "Distribution".

Distribution

Distribute Reports by: Email

Mail Information

Single Address 1212999999@emfax.c

From: John Doe

Reply Address: john_doe@ibi.com

Subject: Email to Fax

General Information

Report Name: salesreport

☒ Select report as inline message

☐ Send report as attachment

Enter message for body of email:

Please see attachment

At the bottom of the form are several buttons: Back Next Save Run Cancel Help

2. **Mail Information.** Select *Single Address* from the drop-down list.

In the accompanying text box, enter the e-mail address to be used by the e-mail provider according to their requirements. In this example, it is *phone-number@emfax.com* or *12129999999@emfax.com* (where *emfax.com* is the name of your e-mail provider).

Note: You can also select a *Distribution List* or a *Distribution File*. However, be sure to use the syntax required by your provider.

3. **From.** This can be any value (for example, the name of the person creating the schedule). This is not required by ReportCaster, but may be required by your e-mail system or by the e-mail provider.
4. **Reply Address.** Enter your registered e-mail address. If your e-mail system is unable to deliver the content, the undeliverable output message is returned to this address.
5. **Subject.** Enter the text you want to appear in the message's subject line. This information is not required by ReportCaster, but may be needed by your e-mail system or e-mail provider.
6. **Save As Report Name.** Enter the name of the report to be distributed.
7. Select the *Select report as inline message* radio button.

Note: You cannot distribute an e-mail attachment to a fax machine.

8. Click *Next* on the bottom of the window to continue to the Settings window. For more information, see *Priority and Notification Options* on page 3-20.

Reference Considerations When Distributing a Report Using Email

ReportCaster transfers e-mail asynchronously to your e-mail system. The delivery time depends upon your e-mail system.

Exchange Mail Server Considerations:

- When distributing a report to an Exchange Server, attachment names have a .txt extension added to WP and DOC format output. This occurs because WP and DOC formats are not mapped to a standard MIME type. The Exchange Server interprets WP and DOC output as a text/plain MIME type and adds the .txt extension to the end of the file name. For example, *hold.wp.txt* or *hold.doc.txt*.
- Exchange Server individual recipient names (*person@company.com*) and Exchange Server-defined distribution lists (*#list@company.com*) can be specified in ReportCaster Distribution Lists. However, Exchange Server user-defined distribution lists cannot be referenced in a ReportCaster Distribution List. They are defined internally on the user's machine. The ReportCaster Distribution List is parsed by the user's mail client and not the Exchange Server.

CC:Mail Considerations:

- When you distribute ReportCaster generated e-mail attachments greater than 20K in size to users of cc:Mail, cc:Mail renames the attachment textitm.txt, ignoring the file name and extension supplied by the user. This change affects DOC, HTML, and WP formats on UNIX and Windows platforms. However, despite the naming convention issue, the attachments contain the correct output and can be viewed if the attachment is saved to disk with the correct extension.

Distributing a Report to a Printer

When you distribute a report to a printer, it is sent to your company's network printers. The following section describes how to schedule a report to a printer.

Procedure How to Distribute a Report to a Printer

1. On the Distribution window, select *Printer* from the Distribute Reports by drop-down list. The following option appears:

The screenshot shows a web browser window titled "Create New Schedule - Microsoft Internet Explorer". The main content area is titled "Distribution". Under this title, there is a label "Distribute Reports by" followed by a dropdown menu currently showing "Printer". Below this is a section titled "Distribution Information". Inside this section, there is a dropdown menu showing "Single Printer" and an adjacent empty text input field. At the bottom of the window, there is a row of six buttons: "Back", "Next", "Save", "Run", "Cancel", and "Help".

2. **Distribution Information.** Select *Single Printer* or *Distribution List* from the drop-down list.
 - **Single Printer.** Type the name of the printer.
 - **Distribution List.** Select a Distribution List from the Select Address drop-down list, which displays all printer Distribution Lists that you are the owner of, and all Public printer Distribution Lists. For more information about creating a Distribution List, see Chapter 2, *Creating and Maintaining a Distribution List*.

Note: If the printer you specify is unrecognized, the “Cannot connect to specified printer” message will be recorded in the log file when the Distribution Server tries to distribute the report.
3. Click *Next* on the bottom of the window to continue to the Settings window. For more information, see *Priority and Notification Options* on page 3-20.

Distributing a Report to Managed Reporting

Tip: Information Builders recommends distributing report output to the Report Library rather than to Managed Reporting. The Report Library includes secure access to library content, the ability to save multiple versions of the same report output, and the ability to set an expiration date or keep a specified number of versions.

When you select the Managed Reporting distribution method, the report is distributed to Managed Reporting as a My Report. The report is available to other users who have access to the Domain. The report output is stored in the user’s directory under /basedir.

Note: The PostScript (PS) report format is not supported for this distribution method.

Procedure How to Distribute a Report to Managed Reporting

1. On the Distribution window, select *Managed Reporting* from the Distribute Reports by drop-down list. The following option appears:

The screenshot shows a web browser window titled "Create New Schedule - Microsoft Internet Explorer". The main content area has a blue background with the heading "Distribution". Below this heading, there is a label "Distribute Reports by" followed by a dropdown menu currently showing "Managed Reporting". Underneath is a section titled "Distribution Information" separated by a horizontal line. This section contains a label "Folder Name:" followed by an empty text input box. At the bottom of the window, there is a row of six buttons: "Back", "Next", "Save", "Run", "Cancel", and "Help".

2. **Folder Name.** Enter the job description of the scheduled report. This description must not exceed 90 characters.
3. Click *Next* on the bottom of the window to continue to the Settings window. For more information, see *Priority and Notification Options* on page 3-20.

Note:

- When ReportCaster is configured with a WebFOCUS Client on a z/OS UNIX Web server and a WebFOCUS Reporting Server on z/OS, Managed Reporting distribution is not supported for EXCEL or WK1 format. This limitation is due to an EBCDIC to ASCII translation problem. This problem does not occur when the WebFOCUS Client is installed on UNIX (AIX, HP-UX, Sun) or Windows platforms. Information Builders recommends using the EXL2K format instead.

- When distributing a report to Managed Reporting with a format of COMMA, the following information must be added to the /client52/wfs/etc/mime.wfs file to open the output in Excel:

```
<ADDDTYPE> .csv application/vnd.ms-excel binary yes yes no yes no
```

Distributing a Report to the Report Library

When you create a schedule, you can specify to distribute report output to the Report Library, an optional storage and retrieval facility. When distributing a report to the Report Library, you can send an e-mail informing users of its availability and the link to the content in the library.

The Report Library includes secure access to library content, the ability to save multiple versions of the same report output, and the ability to set an expiration date or keep a specified number of versions. The Report Library is only available to ReportCaster users who have been granted library privileges.

For more information about the Report Library product, see Chapter 5, *Report Library*.

Procedure How to Distribute a Report to the Report Library

1. On the Distribution window, select *Library* from the Distribute Reports by drop-down list. The following options appear:

Distribution

Distribute Reports by Library

Email for Library

☐ Send email after saving report to library

From:

Reply Address:

Subject:

Enter message for body of email:

Please see attachment

Access Options

☒ Owner ☐ Public

☐ Access List

Expiration of Reports in the Library

☒ Never Expire ☐ Expire After 1 version(s)

Back Next Save Run Cancel Help

- 2. Email for Library.** Select the *Send email after saving report to library* check box to send an e-mail message to users with access rights to the content in the Report Library. Any user with access to this report will receive this e-mail message, which contains the URL address needed to access the scheduled report output.

Selecting the *Send email after saving report to library* check box activates the following fields:

- **From (optional).** This can be any value (for example, the name of the person creating the schedule). This is not required by ReportCaster, but may be required by your e-mail system.
 - **Reply Address (required).** The sender's e-mail address. If report recipients reply to the notification, their messages will be sent to this address. If your e-mail system is unable to deliver a report, the undeliverable report message is also returned to this address.
 - **Subject (optional).** Enter the text you want to display in the subject line of the e-mail message.
 - **Enter message for body of email (optional).** Enter an e-mail message in the text box. You can overwrite the default message.
- 3. Access Options.** Select one of the following radio buttons:
- **Owner.** Only the Owner of the schedule has access to the report in the library. This is the default.
 - **Public.** All users with access to the Report Library can view the report in the library.
 - **Access List.** Only the users or groups defined in the Access List can view the report.
- For more information about creating a Library Access List, see *Creating and Maintaining a Library Access List* in Chapter 5, *Report Library*.

4. **Expiration of Reports in the Library.** Select one of the following radio buttons:
 - **Never Expire.** The report will remain in the Report Library until it is manually deleted by the owner or ReportCaster Administrator.
 - **Expire after.** If you select this radio button, specify a number and then select one of the following options:
 - versionon(s).** The Report Library will store the number of versions specified.
 - day(s).** The Report Library will store the report for the number of day(s) specified.
 - week(s).** The Report Library will store the report for the number of week(s) specified.
 - month(s).** The Report Library will store the report for the number of month(s) specified.
 - year(s).** The Report Library will store the report for the number of year(s) specified.
5. Click *Next* on the bottom of the window to continue to the Settings window. For more information, see *Priority and Notification Options* on page 3-20.

Priority and Notification Options

Once you have specified the distribution options, the Settings window is where you specify the priority level of the schedule, and notification options:

The screenshot shows a web browser window titled "Create New Schedule - Microsoft Internet Explorer". The main content area has a blue background and contains the following elements:

- Settings**: A section header.
- Priority Level for the Job**: A dropdown menu with the value "3" selected.
- Notification Options**: A section header.
- Notification will be sent out**: A dropdown menu with the value "On Error" selected.
- Reply Address:** A text input field.
- Subject:** A text input field.
- Brief Notification**: A section header.
- To:** A text input field.
- Full Notification**: A section header.
- To:** A text input field.

At the bottom of the window, there is a row of buttons: Back, Next, Save, Run, Cancel, and Help.

1. **Priority Level for the Job.** Indicate the priority for running the job. 1 is the highest priority, and 5 is the lowest priority. The default priority is 3. The Distribution Server queue sorts scheduled jobs by priority and then by time.
2. **Notification will be sent out.** Send notification of the schedule's status to a specified e-mail address by selecting one of the following options:
 - **On Error.** This is the default. The specified users are notified when errors are encountered while running the schedule. Information Builders recommends using the On Error notification option.
 - **Always.** The specified user is always notified when the schedule runs.
 - **Never.** ReportCaster does not send notification of the schedule's status under any circumstances. If you select Never, you may proceed to step 7.
3. **Reply Address.** Enter the sender's e-mail address. If report recipients reply to the report's sender, their messages will be sent to this address. If your e-mail system is unable to deliver a report, the undeliverable report message is also returned to this address.
4. **Subject.** Enter the text you want to display in the message's subject line. There is a limit of 255 alphanumeric characters.
5. **Brief Notification.** Enter the e-mail address to which you want a brief notification sent. A brief notification sends the schedule ID and job description of a schedule, plus messages about the schedule such as "Completed Successfully." Note that there is no syntax error checking for this field.

Tip: Information Builders recommends using the Brief Notification option when you are sending notification to devices that have limited memory, such as pagers and cell phones.
6. **Full Notification.** Enter the e-mail address to which you want a full notification sent. A full notification sends a complete Job Process Log Report as an e-mail attachment. Note that there is no syntax error checking for this field.

7. Click *Save*. The Created New Schedule Successfully message appears.

You can also select the following buttons:

- **Back.** Takes you back to the previous window.
 - **Run.** Runs the scheduled report immediately but does not create the schedule. This is useful for test purposes. If the report runs successfully, you will receive a confirmation message.
 - **Cancel.** Cancels the schedule request.
 - **Help.** Opens the online Help file.
8. Click *Close* to complete the schedule and exit the Scheduling Wizard.

CHAPTER 4

Maintaining a Schedule

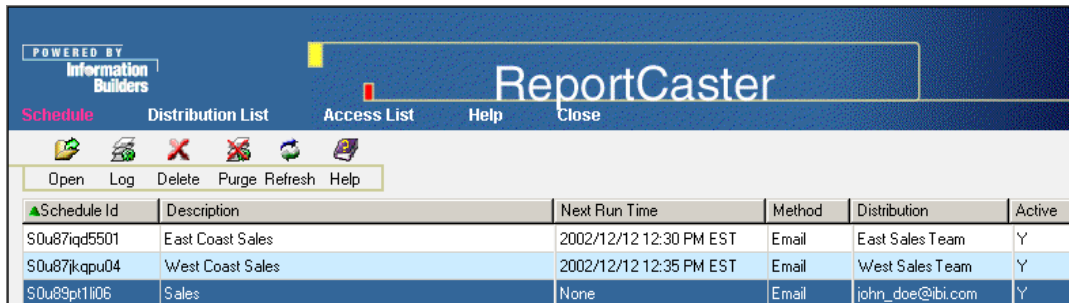
Topics:

- Accessing the Schedule Interface
- Editing a Schedule
- Deleting a Schedule
- Viewing a Log Report
- Purging the Log File

As a Managed Reporting Analytical User, you can schedule your own My Reports using the ReportCaster Scheduling Wizard, which may be accessed from the Business Intelligence Dashboard and Managed Reporting Domains environments (for details, see Chapter 3, *Creating a Schedule*). Once you have created the schedule, you can access the ReportCaster User Administration Services (UAS) Interface to edit the properties of the schedule, delete the schedule, or run a log report to obtain information about the schedule. Additionally, you can purge log records to conserve space in the log file.

Accessing the Schedule Interface

Once you have created a schedule using the Scheduling Wizard, you can perform various maintenance functions on the schedule. From the ReportCaster UAS Interface, click the Schedule link. The Schedule window appears displaying all schedules that you have created.



Schedule Id	Description	Next Run Time	Method	Distribution	Active
S0u87iqd5501	East Coast Sales	2002/12/12 12:30 PM EST	Email	East Sales Team	Y
S0u87kqpu04	West Coast Sales	2002/12/12 12:35 PM EST	Email	West Sales Team	Y
S0u89pt1i06	Sales	None	Email	john_doe@ibi.com	Y

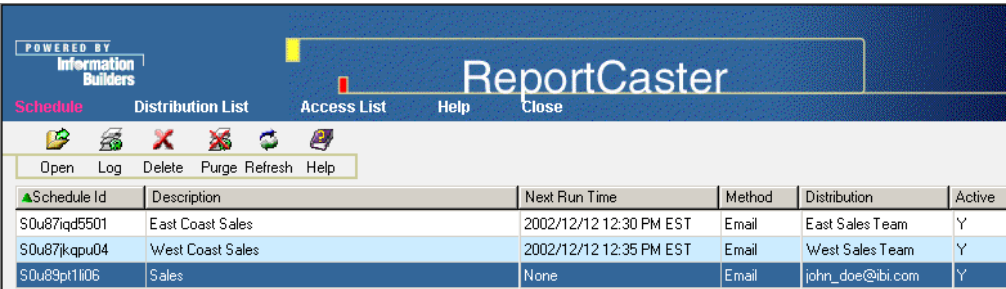
The Schedule window contains icons that enable you to:

- **Open** the Scheduling Wizard to edit the properties of a selected schedule. For more information, see *Editing a Schedule* on page 4-3.
- **Log**. View a Job Process Log Report for a selected schedule. For more information, see *Viewing a Log Report* on page 4-5.
- **Delete** a selected schedule. For more information, see *Deleting a Schedule* on page 4-5.
- **Purge** log file information for a selected schedule or for all schedules in your list. For more information, see *Purging the Log File* on page 4-9.
- **Refresh** the current schedule list with any newly created schedules.
- **Help**. Open the online Help documentation.


Editing a Schedule

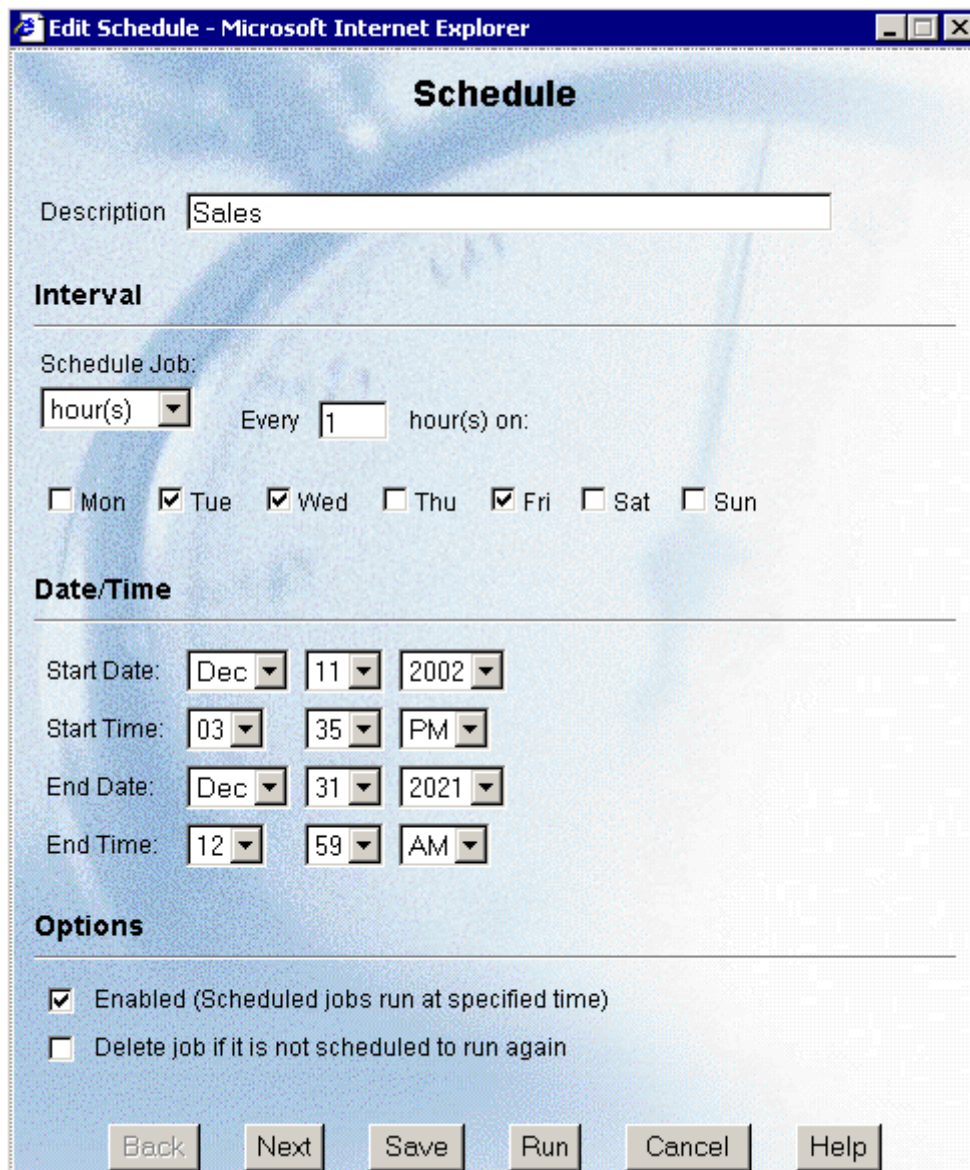
From the Schedule window in the ReportCaster UAS Interface, you can edit your own previously created schedules at any time by performing the following steps:

1. Select the schedule you want to edit (for example, Sales):



Schedule Id	Description	Next Run Time	Method	Distribution	Active
S0u87iqd5501	East Coast Sales	2002/12/12 12:30 PM EST	Email	East Sales Team	Y
S0u87kqpu04	West Coast Sales	2002/12/12 12:35 PM EST	Email	West Sales Team	Y
S0u89pt1i06	Sales	None	Email	john_doe@ibi.com	Y

2. Click the *Open* icon  or double-click the schedule. The Scheduling Wizard opens to the Schedule window and displays all previously entered information for the schedule:



The screenshot shows a web browser window titled "Edit Schedule - Microsoft Internet Explorer". The main content area is titled "Schedule" and contains the following sections:

- Description:** A text box containing the word "Sales".
- Interval:**
 - Schedule Job:** A dropdown menu showing "hour(s)".
 - Every:** A text box containing the number "1".
 - hour(s) on:** A label.
 - Days:** A row of checkboxes for days of the week: Mon (unchecked), Tue (checked), Wed (checked), Thu (unchecked), Fri (checked), Sat (unchecked), and Sun (unchecked).
- Date/Time:**
 - Start Date:** Three dropdown menus showing "Dec", "11", and "2002".
 - Start Time:** Three dropdown menus showing "03", "35", and "PM".
 - End Date:** Three dropdown menus showing "Dec", "31", and "2021".
 - End Time:** Three dropdown menus showing "12", "59", and "AM".
- Options:**
 - ☒ Enabled (Scheduled jobs run at specified time)
 - ☐ Delete job if it is not scheduled to run again

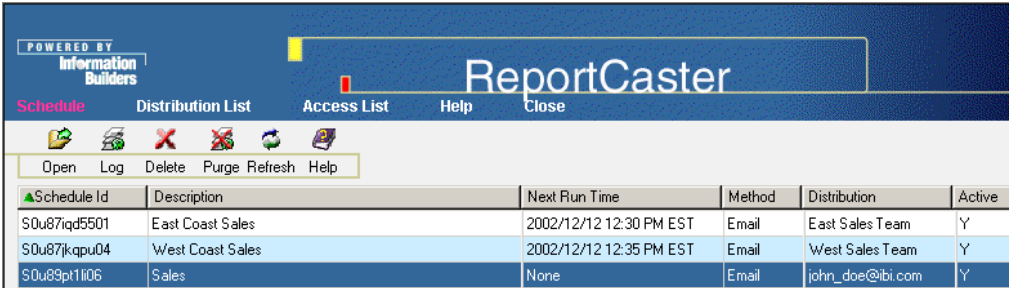
At the bottom of the window, there are six buttons: "Back", "Next", "Save", "Run", "Cancel", and "Help".


- 3. Make the changes to the schedule. For more information about navigating through the Scheduling Wizard, see Chapter 3, *Creating a Schedule*.
- 4. Click *Save* to complete the schedule.

Deleting a Schedule

From the Schedule window in the ReportCaster UAS Interface, you can delete your own schedules at any time by performing the following steps:

- 1. Select the schedule you want to delete (for example, Sales):



- 2. Click the *Delete* icon . A message appears asking for confirmation that you want to delete the selected schedule. Click *OK* to confirm that you want to delete the schedule.

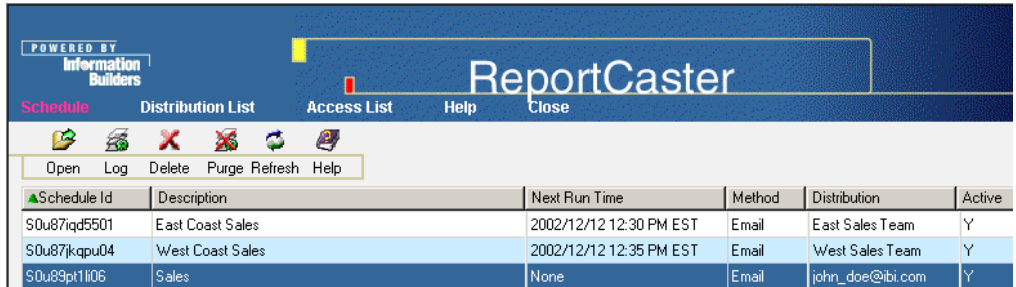
Viewing a Log Report

Information about the date, time, execution status, and recipients of a distributed report job can be accessed using the Log icon. The Log icon enables you to run a log report that contains information about a distributed job, such as whether or not the job executed successfully, when the report output was distributed, in what format the report output was sent, and the method of distribution. Log reports are stylized HTML format and display in a separate browser window. You can search, print, or save the log report.

Procedure How to View a Log Report

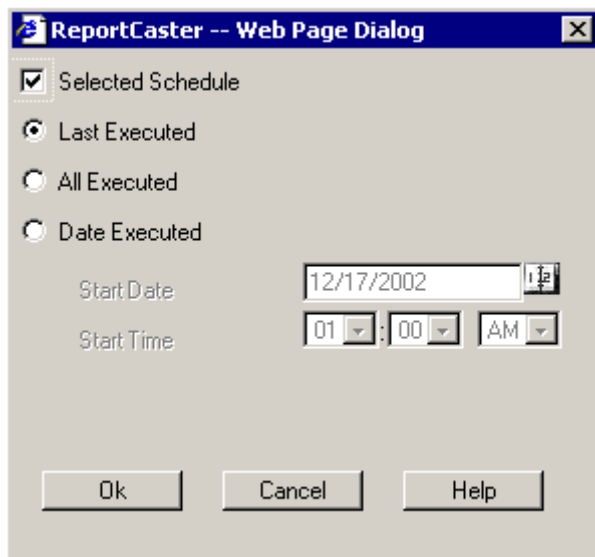
From the Schedule window in the ReportCaster UAS Interface, you can view a log report for a schedule by performing the following steps:

1. Select the schedule for which you want to view the log report (for example, Sales):



Schedule Id	Description	Next Run Time	Method	Distribution	Active
S0u87iqd5501	East Coast Sales	2002/12/12 12:30 PM EST	Email	East Sales Team	Y
S0u87kqpu04	West Coast Sales	2002/12/12 12:35 PM EST	Email	West Sales Team	Y
S0u89pt1i06	Sales	None	Email	john_doe@ibi.com	Y

2. Click the *Log* icon. The ReportCaster - Web Page Dialog dialog box opens with the Selected Schedule check box active and checked, and the Last Executed radio button selected:



ReportCaster -- Web Page Dialog

☒ Selected Schedule

☒ Last Executed

☐ All Executed

☐ Date Executed

Start Date: 12/17/2002

Start Time: 01:00 AM

Ok Cancel Help

To switch from the schedule you selected to viewing information about all of your schedules, uncheck the *Selected Schedule* check box. If you want to change your selection criteria, click *Cancel* and reselect another schedule from the list.

3. Select one of the following radio buttons:
- **Last Executed.** Produces a Job Process Log Report containing the most currently run process for the selected schedule or for all schedules (if you did not select a schedule). This is the default.
 - **All Executed.** Produces a Job Process Log Report containing all run processes for the selected schedule or for all schedules (if you did not select a schedule).
 - **Date Executed.** Activates the Start Date and Start Time fields.
- If you have selected the Date Executed option, proceed to step 4. Otherwise, proceed to step 6.
4. In the Start Date field, specify the date on which you want the log report to begin. The report will display all processes for the selected schedule (or schedules) that were run on or after the specified Start Date. You can select a Start Date from the pop up calendar, or you can accept the default Start Date, which is the current date.
5. In the Start Time field, specify a start time for the Start Date by using the drop-down lists. The default for the Start Time field is 1:00 A.M.
6. Click *OK* to view the Job Process Log Report.

Example Reading a Log Report

The Job Process Log Report displays information according to your specifications in a separate browser window. One log record is produced for each scheduled job run in the specified time frame. The Job Process Log Report will display similar to the following:

Job Process Log Report

Job Description: Sales

User: rcanalytical

Procedure: J0u6hggbst07

Schedule ID: S0u6hggtjun07

Start Time: 2002-11-20 02:59:02

End Time: 2002-11-20 02:59:02

Starting worker thread

Starting task: rcanalytical/Sales

Task type: MRE My Report

Retrieving MRE report: rcanalytical/Sales

Connecting to server EDASERVE with static execution id

Executing focexec.

Task finished.

salesreport.htm distributed to chuck_hill@ibi.com

A Job Process Log Report includes the following information:

- **Job Description.** Unique description that you supplied to identify the schedule.
- **User.** ReportCaster user ID, indicating the owner of the schedule.
- **Procedure.** Unique, ReportCaster-generated key that identifies a specific execution of a scheduled job.
- **Schedule ID.** Unique, ReportCaster-generated key assigned to the job when it was scheduled.
- **Start Time.** Date and time the job started running.
- **End Time.** Date and time the job finished running.
- **Messages.** These consist of:
 - General information, such as the method of distribution for a particular job (for example, mail distribution).
 - Processing information, indicating that the request started, distribution was successful, and the request completed. Processing information also includes reasons why a request failed, such as the unavailability of a data source.

Reference Considerations When Viewing a Log Report

When viewing a Job Process Log Report, be aware of the following considerations.

E-mail Addresses:

ReportCaster cannot validate e-mail addresses, so incorrect e-mail addresses are not noted in a Job Process Log Report.

Bursted Reports:

- If the Distribution List does not contain all possible values for the primary sort (BY) field specified in the procedure, the following message is no longer included in the log report:

`NO RECIPIENT SPECIFIED FOR BURST VALUE burst value.`

This will significantly reduce the size of the log report, particularly when the database contains many values for the primary field and only a very small subset of those values are burst.

- When a report is successfully burst using the value(s) in the Distribution List, the log includes the following message for each burst value:

`FILE filename SUCCESSFULLY DISTRIBUTED TO destination FOR burst value.`


- If a burst value is specified, but the value does not exist, the following message appears in the log file:

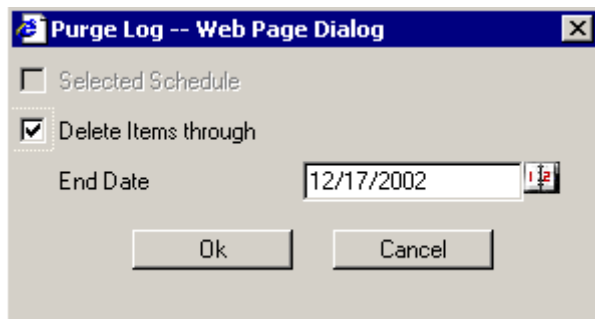
VALUE burst value DOES NOT EXIST FOR by field.


Purging the Log File

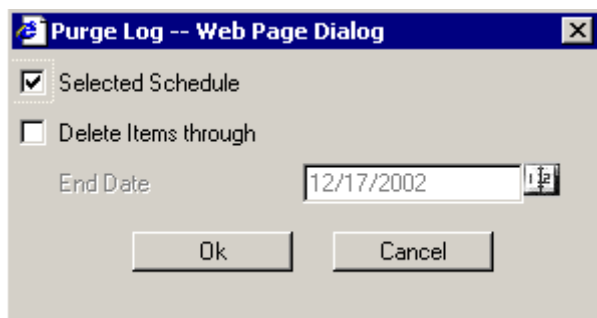
The log file accumulates information and can become difficult to navigate. Information Builders recommends that you periodically purge log records to conserve space.

You can purge the log file in one of two ways:

- **Purge log file information for all schedules.** Without selecting a schedule, click the *Purge Log* icon . The Purge Log - Web Page Dialog dialog box opens with the Selected Schedule check box inactive and unchecked, and the Delete Items through check box active and checked.

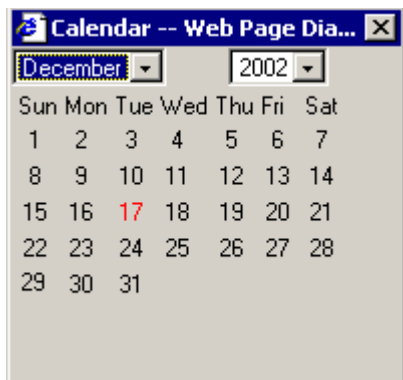


- **Purge log file information for a specific schedule.** Select a schedule and then click the *Purge Log* icon . The Purge Log - Web Page Dialog dialog box opens with the Selected Schedule check box active and checked, and the Delete Items through check box inactive and unchecked.



To switch from purging the selected schedule to purging all schedules, uncheck the *Selected Schedule* check box.

Selecting the Delete Items through check box activates the End Date field, where you can specify the date through which you want to purge the log records. The default End Date is the current date. To change the End Date, click the calendar to the right of the End Date field and select the End Date from the pop-up calendar:



Click *OK* to purge the log file, or click *Cancel* to cancel the purge request.

Note: To verify that the specified log files have been deleted, you may want to run a Job Process Log Report again to note the new log output. The deletion of log files is immediate.

CHAPTER 5

Report Library

Topics:

- Creating and Maintaining a Library Access List
- Viewing Library Content

When you create a schedule (see Chapter 3, *Creating a Schedule*), you can specify to distribute report output to the Report Library, an optional storage and retrieval facility. When distributing report output to the Report Library, you can send an e-mail informing recipients of its availability and the link to the content in the library.

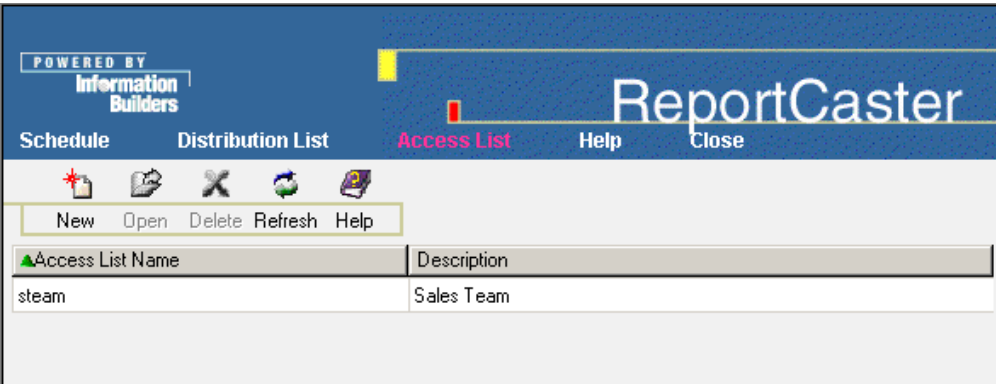
The Report Library includes secure access to library content, the ability to save multiple versions of the same output, and the ability to set an expiration date or keep a specified number of versions. The Report Library is available only to ReportCaster users who have been granted access to the library.

Creating and Maintaining a Library Access List

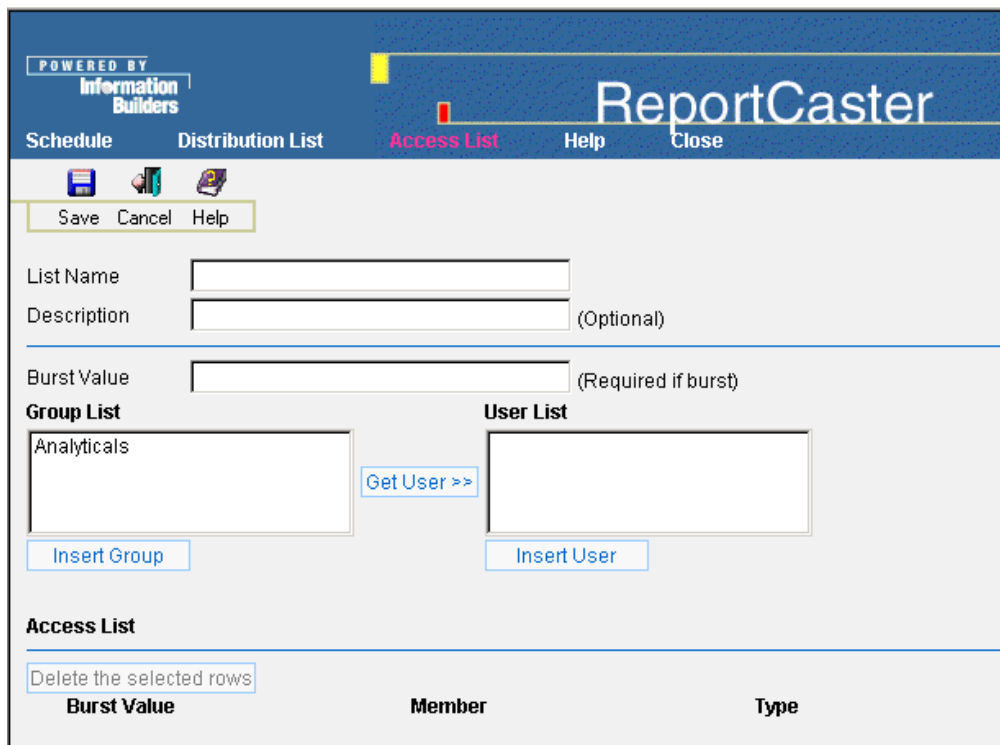
An Access List is similar to a Distribution List. Access Lists define the users and groups that are allowed to view the output of specified schedules distributed to the Report Library. Once the Access List is created, it can be used as often as needed. Each Access List is created as a private list that is known only by ReportCaster Administrators and the user who created it.

Procedure **How to Create a New Library Access List**

- 1. From the ReportCaster UAS Interface, click the *Access List* link. All Access Lists that you have created appear:



2. Click the New icon . The following window appears:



POWERED BY
Information Builders

ReportCaster

Schedule Distribution List **Access List** Help Close

Save Cancel Help

List Name

Description (Optional)

Burst Value (Required if burst)

Group List

Analytics

Get User >>

User List

Insert Group Insert User

Access List

Delete the selected rows

Burst Value	Member	Type
-------------	--------	------

List Name. Enter the name of the Library Access List.

Description. Enter a description that can be used to identify the list.

Burst Value. Optionally enter a burst value.

3. Add groups and users to the Access List.

To add groups to the Access List:

- In the Group List field, select the group or groups you want to add to the Access List (for example, Analytics), and then click *Insert Group*. This populates the Burst Value (if applicable), Member, and Type fields at the bottom of the window. Note that only groups that have been granted access to content in the Report Library appear in the Group List. All members of the group will have access.

To add users to the Access List:

- In the Group List field, select the group from which you want to add users to the Access List, and then click *Get User*. This populates the User List field with the users from the specified group. In the User List field, select the user or users you want to add to the Access List (for example, rcanalytical), and then click *Insert User*. This populates the Burst Value (if applicable), Member, and Type fields at the bottom of the window.

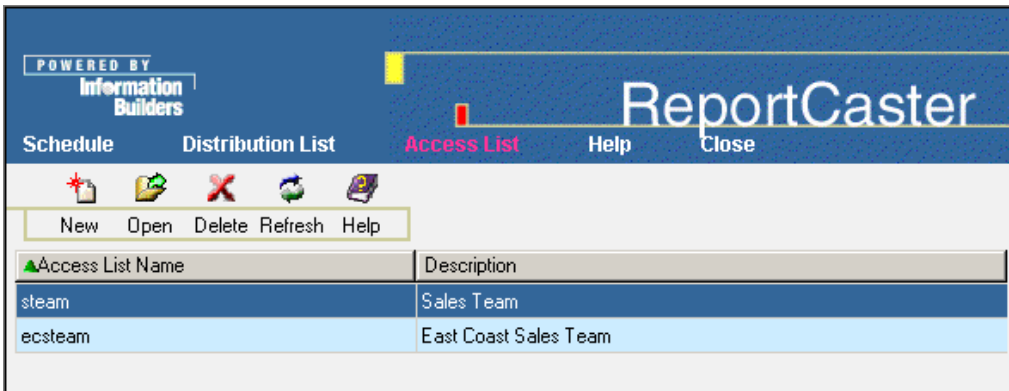
Note: To delete a group or user from the Access List, select that group or user and then click *Delete the selected rows*.


4. Click *Save* to save the Access List.


Editing and Deleting a Library Access List

From the Access List window in the ReportCaster UAS Interface, you can edit or delete your own previously created Access Lists at any time by performing the following steps:

1. Select the Access List you want to edit or delete (for example, Sales Team):



2. To edit the Access List, click the *Open* icon .

To delete the Access List, click the *Delete* icon .

3. If you are editing the Access List, make the necessary changes and save the list. Note that if you rename the Access List, the original Access List will remain unaltered.

If you are deleting the Access List, a message appears asking for confirmation that you want to delete the list. Click *OK* to confirm that you want to delete the Access List.


Viewing Library Content

The Library Content interface is where you can view content in the Report Library to which you have been granted access. You can access the Library Content interface in several ways:

- When you create a schedule to be distributed to the Report Library (for details, see Chapter 3, *Creating a Schedule*), you can send an e-mail message to all recipients with access rights to the content in the Report Library. This message contains the URL needed to access the content. If you receive such an e-mail:
 - Open the e-mail and click the link to the library content. The logon window opens.
 - Enter your ReportCaster user ID and password. After a successful logon, you are sent directly to the specified output within the Library Content interface.

There is a link back to the Library Content interface that enables you to view additional content to which you have access in the library.

- If you do not receive an e-mail notification, you can access the Library Content interface from Managed Reporting or Business Intelligence Dashboard by clicking the *Report*

Library icon  on the gray toolbar.

- To access the Library Content interface directly from a browser, enter the following URL:

<http://hostname/rcaster/library/liblogon.htm>

where:

[hostname](#)

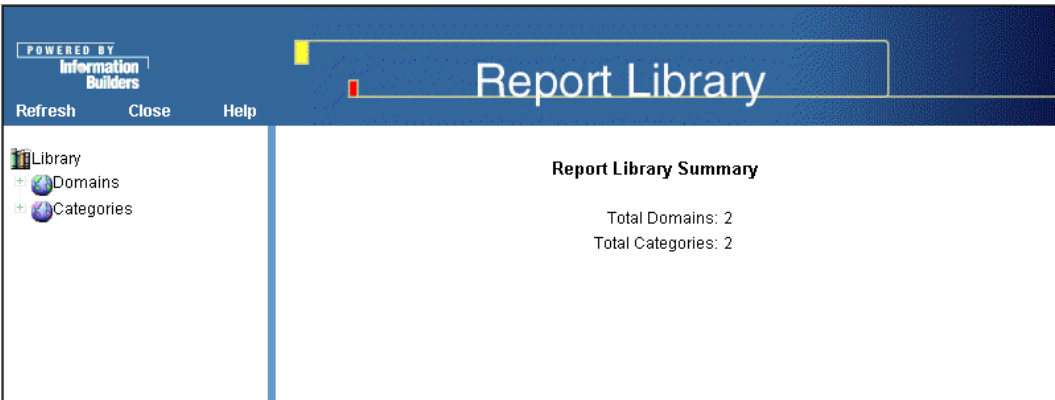
Is the host name of the Distribution Server.

Enter your ReportCaster user ID and password. After a successful logon, you can view all content to which you have access in the Report Library.

Viewing Content in the Report Library

When you access the Library Content interface, the Report Library Summary window opens displaying either or both of the following:

- **Domains** contains Managed Reporting Standard Reports and My Reports content.
- **Categories** contains WF Server Procedures, the contents of URLs, and files.



Procedure How to View Content in the Report Library

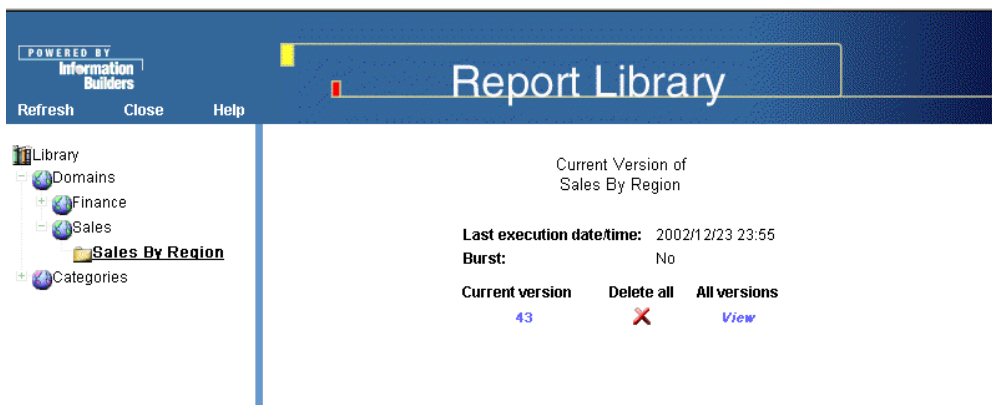
1. Select Domains or Categories. If you select Domains, the available Domains appear



- Click a Domain or Category to view summary information about the folders within the Domain or Category. For example, if you click the Sales Domain, the Sales By Region folder appears in the tree structure on the left side of the window, and the Current Version Summary of Sales report appears on the right side of the window:



- To view content in a specific Domain or Category folder, click the folder (for example, *Sales By Region*) on the tree structure on the left side of the window. The Current Version Summary of *Sales By Region* window appears with the following information:



- Last execution date/time.** The date and time of the last schedule execution and distribution. The date format is YYYYMMDD, where YYYY is the 4-digit year, MM is the month, and DD is the day of the month. The time format is the format HHMM, where HH is the hour and MM is the minute.
- Burst.** Possible values are Yes (burst) and No (do not burst).
- Burst Value (optional).** Only appears when Burst is Yes. Values for this field are Non Burst (highlighted in red) or the burst value.

- **Current version.** The number of versions currently in the library. Click the version (for example, 43) to view the latest output.

Note that ReportCaster does not renumber when versions are deleted. For example, if you delete versions 1 through 43, the next report sent to the Report Library will be version 44.

- **Delete all (optional).** Only appears if you are the owner of the schedule. If you click the Delete All icon (which displays as a red X), a message appears asking for confirmation that you want to delete all versions of the selected content. Click *OK* to confirm the deletion, or click *Cancel* to cancel the request.
- **All versions.** Click *View* to view a summary of all output in the library. A window appears specifying the version number, the size (in bytes), the format (for example, HTML), the execution date and time, and the Delete icon (if you are the owner of the schedule):

The screenshot shows the 'Report Library' window. On the left is a tree view with 'Library' expanded, showing 'Domains', 'Finance', 'Sales', 'Sales By Region', and 'Categories'. The main area displays a 'Report List of Sales By Region' with a 'Burst: No' indicator. Below this is a table with columns: Version, Size, Format, Execution date/time, and Delete. The table lists five versions: 43, 42, 41, 40, and 39, all with a size of 1239 and format of HTML. Each version has a red 'X' in the Delete column.

Version	Size	Format	Execution date/time	Delete
43	1239	HTML	2002/12/23 23:55	X
42	1239	HTML	2002/12/23 23:45	X
41	1239	HTML	2002/12/23 23:35	X
40	1239	HTML	2002/12/23 23:25	X
39	1239	HTML	2002/12/23 23:15	X

Click a specific version (for example, 43) to view its content:

PAGE 1				
Region	Category	Product	Unit Sales	Dollar Sales
Midwest	Gifts	Thermos	905045	11400665
Northeast	Gifts	Thermos	916675	11392300
Southeast	Gifts	Thermos	935232	11710379
West	Gifts	Thermos	932039	11652946

APPENDIX A

ReportCaster Formats

Topics:

- ReportCaster Formats for Scheduled Output

Using ReportCaster, you can distribute scheduled output in the following formats:

- ALPHA
- COMMA
- DOC
- EXCEL
- EXCL97
- EXL2K
- EXL2K FORMULA
- GIF
- HTML
- PDF
- PS
- TABT
- WK1
- WP
- XML

For information about how these formats relate to ReportCaster, see *ReportCaster Formats for Scheduled Output* on page A-2.

ReportCaster Formats for Scheduled Output

When you create a task for a schedule, you specify the format for the scheduled output. The following table describes the different types of available ReportCaster formats:

Format	Description	Suggested Uses	Considerations
ALPHA	Saves scheduled output as fixed-format character data.	For display in a text document; for further reporting in WebFOCUS; as a transaction file for modifying a data source.	When created as a HOLD file, a corresponding Master File is created. Bursting is not supported.
COMMA	<p>Saves scheduled output as a variable-length text file in comma-delimited format with character values enclosed in double quotation marks. All blanks within fields are retained.</p> <p>This format is required by certain software packages such as Microsoft Access.</p>	For further processing in a database application. This format type can be imported into applications such as Excel or Lotus.	<p>This format type does not create a Master File.</p> <p>Bursting is not supported.</p> <p>Smart date fields and dates formatted as I or P fields with date format options are treated as numeric and are not enclosed in double quotation marks in the output file. Dates formatted as alphanumeric fields with date format options are treated as alphanumeric and enclosed in double quotation marks.</p> <p>Continental decimal notation (CDN=ON SPACE QUOTE) is not supported. A comma within a number is interpreted as two separate columns by a destination application such as Microsoft Access.</p>

Format	Description	Suggested Uses	Considerations
DOC	Scheduled output opens as a plain-text word processing document. Text can be opened by any word processing application. Retains ASCII form feed characters to correctly page output.	Word Processing applications, printing unformatted reports, e-mail, Report Library.	Does not retain most formatting. Does not support hyperlinks or alerts. Can be distributed as an e-mail attachment or as an inline e-mail message. Bursting is supported.
EXCEL (XLS)	For Excel 2000 and earlier, scheduled output opens as a Microsoft Excel spreadsheet file.	E-mail, Managed Reporting	Any version of Microsoft Excel must be installed. Cannot use the print distribution method. Does not support bursting reports or alerts. Does not retain headings, footings, subheads, or subfoots. The format is binary.
EXCL97 (XLS)	Scheduled output opens as an Excel97 spreadsheet file, an HTML-based display format that supports report formatting and drill-downs.	E-mail, Report Library	Microsoft Excel 97 or higher must be installed. Bursting is supported.

Format	Description	Suggested Uses	Considerations
EXL2K (XLS)	For Excel 2000 and higher, scheduled output opens within Excel 2000. Supports most StyleSheet attributes, allowing for full report formatting.	E-mail, Report Library	Microsoft Excel 2000 or higher must be installed. The format is ASCII. All EXL2K output with an .xht extension is dynamically changed to .xls for e-mail or FTP distribution. You must edit your Web server's MIME table so that the .xls extension is ascii/application data instead of binary. Bursting is supported.
EXL2K FORMULA (XLS)	For Excel 2000 and higher, scheduled output opens within Excel 2000. Contains Excel formulas that calculate and display the results of any type of summed information (such as column totals, row totals, and sub-totals).	E-mail, Report Library	Microsoft Excel 2000 or higher must be installed. The format is ASCII. All EXL2K output with an .xht extension is dynamically changed to .xls for e-mail or FTP distribution. You must edit your Web server's MIME table so that the .xls extension is ascii/application data instead of binary. Bursting is supported.
GIF	Scheduled output opens as a graphic in GIF format.	E-mail, Report Library	Only works with procedures that contain GRAPH FILE syntax. Bursting is supported and is performed on the second BY field in the GRAPH FILE request.

Format	Description	Suggested Uses	Considerations
HTML (HTM)	Supports hyperlinks and other World Wide Web features. Retains StyleSheet formatting.	Report Library, e-mail for display in a Web browser	Bursting is supported except for FML reports. Can be distributed as an e-mail attachment or as an inline e-mail message.
PDF	Appearance of the scheduled output is preserved in an electronic document when printed using Adobe Acrobat. Retains all relevant StyleSheet formatting.	E-mail, Report Library	Does not support hyperlinks in e-mail attachments. Recipient must have an Adobe Acrobat application to view. The OS/390 UNIX platform requires the Web server configuration file to have the MIME setting for PDF set to binary in mime.wfs. Bursting is supported.
PS	Appearance of the scheduled output is preserved in an electronic document when printed using PostScript. Retains all relevant StyleSheet formatting.	Printing	Does not support hyperlinks. Printers must support PostScript. Recipient must have a GhostView application to view. Bursting is not supported.
TABT (TAB)	Scheduled output opens in tab-delimited format, including column headings in the first row. This format is required by certain software packages such as Microsoft Access.	E-mail, Report Library	Bursting is not supported.

Format	Description	Suggested Uses	Considerations
WK1	Scheduled output opens within Lotus 1-2-3, Excel.	Report Library, e-mail	<p>In the mime.wfs configuration file:</p> <ul style="list-style-type: none"> You must specify 'no' in the 'rdr' column to launch Lotus 1-2-3. You must specify 'yes' in the 'rdr' column to launch Excel. The format is binary. <p>Cannot use the print distribution method. Does not support bursting reports or alerts. Does not retain headings, footings, subheads, or subfoots.</p> <p>Lotus 1-2-3 or Excel must be installed. Internet Explorer 5.5 or higher is the preferred browser.</p>
WP	Scheduled output opens as a plain-text word processing document in the Web browser. Text can be opened by any word processing application.	Word processing applications, printing unformatted reports, e-mail, Report Library.	<p>Does not retain page breaks or most formatting. Does not support hyperlinks, bursting, or alerts.</p> <p>Can be distributed as an e-mail attachment or as an inline e-mail message.</p>
XML	Scheduled output opens in XML format, a markup language that is derived from the Standard Generalized Markup Language (SGML).	Describing and exchanging data for applications on different systems.	Bursting is not supported.

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Reader Comments

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